

RESIDENTIAL ENGAGEMENT SOLUTION QUESTIONS AND ANSWERS

Questions	City's Response
Functional Requirements	
1. Need / Reason for demo -Main challenges you are looking to solve (per department if applicable):	Vendors are required to demonstrate system functionality.
2. Current setup - Current phone solution: - Integrations (CRM, ...): - Call volume: - How many users (Team/Dept. setup):	Current Phone Solution: Cisco Integrations: See RFP for core platforms Call Volume: 151412 call in 2021. Users: We currently have 728 Active Accounts for general fund.
3. Product features & requirements - Must have: -Nice To Have -Integrations for future deployment -Porting numbers, int./local calls, numbers	See RFP for details.
4. Time frame - Go Live Date:	Prefer align to launch of new website - Est. April 1, 2023.
5. Competitive landscape - Which phone solution providers will be evaluated:	City currently uses Cisco. It is not on the roadmap to change solutions.
6. Does Cleveland use any other CRM for 311 aside from CityWorks? (Salesforce, etc)	No.
7. Based on the minimum service requirements, is the proper assumption that the vendor is providing the telephony (call handling) solution?	Yes.
8. Please clarify if the Route Optimization solution mentioned in the Vendor Client References on page 6 of 52 is referring to geographic routing to a location or call routing as part of a telephony solution.	Not applicable...please disregard.
9. Who is the incumbent for this contract? Contract number? Length of service? Satisfaction?	N/A
10. What are the main points to improve upon should you transition to a new vendor partner?	Web application for self service, knowledge base/content management, multichannel communication.
11.What is the current/anticipated level of staffing by labor category, please?	311 Call Center: 8-10 agents , 1 manager, 1 business analyst

12. What are the current billable rates, by labor category or other billable unit, and/or annual program cost (if available)?	N/A
13. Please provide 12 months of historical call volumes. Please also including arrival patterns by hour/half-hour, if possible.	We handled 151412 call in 2021.
14. What are the most notable successes and challenges since launching the program?	N/A
15. Can you please let us know how many agents you have that will be answering the calls for 311?	7 Full Time agents and 1 Temp agent
16. The RFP background section states 'There is no publicly accessible online portal for service requests currently, however, the city will be implementing online ArcGIS Citizen Problem Reporter (CPR) a Crowdsource Reporter application by October 7, 2022.' If the new proposed CRM provides this capability, what will the City want to do with the CPR application after GoLive?	The City did not implement ArcGIS Citizen Problem Reporter (CPR) a Crowdsource Reporter application
17. Does the City have any existing knowledge articles or content that would need to be migrated to the new solution? Or will the City work with the vendor to create all new knowledge content and articles?	City have any existing knowledge articles or content and the City will work with the vendor to create all new knowledge content and articles.
18. Section 3 Requirements section states 'Interface/Integrate - with existing client database (CityWorks, Accela, etc.) to ensure user profiles are consistent between databases.' Please clarify this requirement to explain what clients are and who the user profiles are - are these citizens or businesses in the City, or City staff?	City staff.
19. Section 3 Requirements section under heading 311 Call Center Request Management - please clarify if the City is looking for a new call center telephony system to go with the new Resident Engagement solution, or just the ability to integrate with telephony features of the City's Cisco phone system.	At this time, City is looking for the ability to integrate with City's Cisco phone system.
20. How many social accounts would the City anticipate wanting to integrate the CRM solution with by platform (Facebook, Twitter, etc...)?	Minimally, 3 accounts.

21. Section 3 Requirement section discusses Follow-up-via Multiple Channels - is the City interested in being able to push notifications to citizens who have opted in to receive these types of outbound notifications that are not specifically tied to existing service requests? For example, pushing notifications about weather, service delivery changes by departments, holiday schedule changes, etc.	All of the above, willing explore options.
22. Section 3 Requirements section states 'Interface with document and fax management systems to open, process, route, and track mail and fax interactions.' What are the current volumes of fax or mail interactions with the public and the Call Center?	Currently we receive about 5 - 10 fax or mail interactions with the public and the Call Center daily.
23. Section 3 Requirements section states 'Report on and manage call back commitments.' Please clarify and explain what the City wants to see with managing call back commitments. Can you define what a call back commitment is?	Automated phone call to notify resident of service request status.
24. Section 3 Requirements for GIS state 'Integrate Resource Directory applications that map the citizen address against services available in their neighborhood.' Please identify how many Resource Directory applications the City currently has, and provide an example of how services are defined by location or neighborhood.	The city does not currently have Resource Directory applications. Services are geocoded based on GIS Map overlays within CityWorks.
25. Section 3 Requirements for Account Maintenance and Contact History state 'Ability to validate address of the request through interface with City GIS.' Please clarify how this works for contacts who may not live within the City limits or within the City's GIS footprint.	Service requests will only be applicable to locations within the City's GIS footprint.
26. Section 3 Requirements for 311 Contact Center productivity tools states 'Quality Management embedded Agent Evaluation forms.' Please clarify if this requirement is for workforce management QA for call center agents.	Functionality is expected to be offered based on vendor's software solution.
27. Section 3 Requirements for Analysis and Reporting states 'Integrate with external databases and analytics platforms (SQL, Azure, AWS, Tableau, PowerBI). Please provide the number of Tableau and PowerBI licenses the City has that could be integrated with the new 311 CRM solution.	City is expanding its analytics capabilities now. We expect data will be viewed using Tableau/PowerBI enterprise wide and created by team of ~10 builders.

28. Section 3 Requirements for Service Request Management and Workflow/Business rules state 'Provide a "super-user" with capabilities to set up and administer business rules, such as workflow and decision trees, and Create application-based service level agreement rules.' How many service request types would the City require for implementation of the project?	We currently have 59 service requests in use by the 311 call center. They will all require integration with Cityworks.
29. How many CRM users and staff would be in the 311 Call Center?	8-10 agents , 1 manager, 1 business analyst
30. How many CRM users would be in the City departments and executive offices?	We currently have 728 Active Accounts for general fund. The city will be expanding acces citywide over next 3 years. Vendors are encouraged to provide site or enterprise licenses.
31. How many City IT staff would be users/administrators of the CRM system?	No more than 10 IT staff administrators.
32. Which CTI is currently being used for call centre?	We currently have no CTI application.
33 What is the role of remote agent?	The role is the same as a regular agent, they will need the ability to wfh.
34. How much data are we planning to migrate?	We do not have a current platform and we do not intend to migrate any existing service requests.
35. What are the expected number of user raising ticket on monthly basis?	We issued and average of 2100 service request monthly in 2021.
36. Would there be any historical or existing service requests to be migrated into the new CRM or would the City start clean with the launch of the new solution?	Yes, the city has historical service request templates and related data that expected to be migrated and/or integrated with a new system.
37. What is the proposed budget for the initial implementation of the CRM solution, both for SaaS annual license subscriptions, and for implementation services, broken down by year.	There is no proposed budget.

<p>38. key factors which influence the cost and duration of the implementation include:</p> <ul style="list-style-type: none"> - the number of distinct service request types - the number of service request types which require integration to back-office systems - Which of these service request types are to be made available online, via mobile app, and/or via the contact center. 	<p>We currently have 59 service requests in use by the 311 call center. They will all require integration with channels.</p>
<p>39. While vendors will make assumptions in relation to each of these factors, can the City provide more detail for each of these factors, to ensure the City receives realistic and comparable implementation costs from all vendors?</p>	<p>Details are provided in the RFP.</p>
<p>40 Are there any compelling events or dates that you are aiming to meet for deployment of the new system?</p>	<p>Prefer align to launch of new website - Est. April 1, 2023.</p>
<p>41. does the City want to get involved in delivering aspects of the initial deployment of the solution? For example, configuration of service requests, integrations, and/or the styling of the Customer Portal. If so to what degree, e.g., configure 30% of the service requests.</p>	<p>Yes, City would like to be involved in the initial deployment with a focus on components that will require ongoing maintaince/upkeep and configuration.</p>
<p>42. Does the City want citizens to authenticate themselves using a 3rd party Identity Provider (IDP) on the Customer Portal, e.g., via Microsoft Azure B2C IDP, Google, Facebook, etc.?</p>	<p>City prefers to have a few barriers for a citizen to reporting a request as possible. Open to understanding options for authentication if they are easy to use.</p>
<p>43. does the City want users to authenticate themselves using a 3rd party Identity Provider (IDP) e.g. via Microsoft Azure?</p>	<p>City prefers to have a few barriers for a citizen to reporting a request as possible. Open to understanding options for authentication if they are easy to use.</p>
<p>44. In terms of the systems to be integrated with, does the City have a priority for the delivery of each integration to enable a phased implementation that delivers value early?</p>	<p>We currently have 59 service requests in use by the 311 call center. They will all require integration with Cityworks as the primary platform.</p>
<p>46. oes the City have any existing and/or preferred middleware to enable integration? If yes, should vendors assume that all back-office systems will be integrated using said middleware?</p>	<p>The city does not have middleware to enable integration.</p>

47. How many users will need access to the system, both front office (creating/updating requests) and back office (updating/closing requests only)?	We currently have 728 Active Accounts for general fund. The city will be expanding access citywide over next 3 years. Vendors are encouraged to provide site or enterprise licenses.
48. How many service requests are received per year and / or per month on average?	We issued an average of 2100 service request monthly in 2021.
49. Can you share the scoring model you will be using for the selection criteria?	See Appendix E. Pg. 39
50. Does the City have a priority for the delivery of specific service areas to enable a phased implementation that delivers value early?	We currently have 59 service requests in use by the 311 call center. They will all require integration with Cityworks as the primary platform.
51. The RFP: 'Citizen Feedback' section states, 'Allow for creation of standard letter templates for FAQ's and standard questions and answers', and the 'Follow-up-via Multiple Channels' section include the ability to maintain several standard templates to complete a letter and should allow for creation of standard letter templates for FAQ's and standard questions and answers. - Does this mean the creation of actual Word documents for printing/posting or electronic documents with Knowledgebase/FAQ responses for emailing to citizens?	Both, actual Word documents for printing/posting or electronic documents with Knowledgebase/FAQ responses.
52. Appendix E, #D90: Does the City already utilize a document management system that tracks and reports the history of documents?	No
53. Appendix E, #D91: This requirement seems to be cutoff. Could the City please complete the remainder of this requirement?	Revised: Document Management- Remove documents associated with closed cases to an archive.
54. Appendix E, #D117: What system does the City use for existing databases? · Are these applications or databases (such as Oracle or MS SQL server)? · What data is contained within these databases?	Yes, City uses Oracle and MS SQL databases for city-wide data.
55. Appendix E, #D143: What level of detail is the City expecting in the response? Details on security mechanisms? Or will a simple statement of adherence to data security standards (ISO27001, GDPR) suffice?	Complete and full detail.
56. Appendix E, Cybersecurity Requirements: The acronym 'CSU' is used a number of times. Can the City specify what this acronym means?	Does not apply...pls disregard.

57. Appendix E, #C23 & C51: Can City explain 'Kurzweil system'?	Kurzweil system is the Vendor's application
58. Appendix E, #D1, D3: Does the City currently have an existing SMS gateway to use for text communication with residents? If not, does the City wish respondents to include an SMS gateway in their proposals?	The City does not have existing SMS gateway to use for text communication with residents. Please include in your proposal.
59 Is there an existing system currently in use to support the 311 calls ?	Yes.
60. Is a data migration part of this project ? If so please is the source and volume of data that needs to be migrated.	Yes, possibly migration and/or integration with CityWorks.
61. Does city has an established middleware strategy?	No
62. What is the expected volume of city workers and citizens who is going to use the tool that is being built.	728 Active Users for general fund. The City of Cleveland has a population of 395,792.
63. What is the existing knowledge base solution used by city? Roughly what is the volume of articles to be migrated in to the new CRM system ?	The City does not have an existing knowledge base solution.
64. What is the expected volume of enquiries that is anticipated in a month?	We issued an average of 2100 service requests monthly in 2021.
65. Does City has any IT Team that will be involved in the project like project managers, quality assurance team etc..	Yes.
66. Can city please share the complete list of integration that will be part of this project . Are all these peripheral systems are API enabled ?	Refer to RFP, pg.5. All systems or API enabled.
67. Post go live the CRM system, what would be the source of truth for the citizen data. Is it the new system or the legacy systems ?	New system will be the source of truth for citizen data. Service requests will still be managed out of existing systems.
68. What is the expected frequency of the data synch between the CRM and the legacy system ?	Real-time
69. Does city uses any reporting or business intelligence tools ?	Not at this time.
70. What are the compliance requirements from City ?	Pls refer to RFP , Appendix B.
71. What are the data back up and restoring requirements of City ?	Day 0 + 31 Consecutive Daily Backups (can be full and incremental)
72 What are the fax and scanner hardware/software used by City ?	Kyocera models
73. Beyond the integration with the city systems, are there any integration planned with federal or state IT system?	No.

74. Are there any requirements for the city to generate documents and exchange with citizens for signatures ?	Not at this time.
75. Is there a requirement for city to scale up/scale down the call centre staff in short time ?	City is evaluating call center staffing to coencide with the launch of the Resident Engagement solution.
76. What are the working hours of the call centers ? Can you please explain the post go live support need (24x7 or 8x5 etc..)	The current call center hours are 7:30 AM - 5:30 PM Monday - Friday.
77. Does the call center staff will be using desktop or will they need CRM Capability on hand held devices?	Call center staff will be using Desktop.
78. Is there a time line city has in mind to productionalise this project?	Prefer align to launch of new website - Est. April 1, 2023.
80.Does the city uses Single Sign On and MFA solutions or does have any preference if not ?	Office 365 / MFA & SSO
81. What is the current document mangment system used by City ?	Office 365 / SharePoint
82. Integration into ArcGis CPR – what APIs are available to integrate with this system? Does it offer exposed web services? Can you provide a use case example of a citizen question that requires an integration into this system?	This is no longer a requirement, please disregard.
83. Integration with Accela Automation – what APIs are available to integrate with this system? Does it offer exposed web services? Can you provide a use case example of a citizen question that requires an integration into this system?	Construct API's and exposed web services are available. Example: Please board the vacant house next door to me.
84. ESRI ArcGIS - what APIs are available to integrate with this system? Does it offer exposed web services? Can you provide a use case example of a citizen question that requires an integration into this system?	Yes. The city has an enterprose Esri ArcGIS soltuion. Example: Would want to know geolocation of citizen request to determine which Ward citizen lives in for reporting to council.
85. CityWorks Asset and Work order management system what APIs are available to integrate with this system? Does it offer exposed web services? Can you provide a use case example of a citizen question that requires an integration into this system?	Yes, Construct API's and exposed Webservices are available.
86. On page 10 of the RFP, under Citizen Account/Self Service Portal, it specifies that a self-service portal via an app or portal be created. Are self-service applications written in the IVR included in the scope of this RFP?	Self Service portal is a requirement in the Application. an IVR can be included as an option.
87. How many inbound calls per month are answered by your call center?	YTD 14755 average calls monthly.

88. What is the typical call center handling time?	90 Seconds
89. How many agents do you have to answer the inbound calls?	7 Agents
90. Do you currently use outbound call/text/emails for reminders or notifications? If so, how many outbound calls/text/emails per month do you send out?	No.
91. What type of identification or authentication questions would an agent ask before they can open a typical service request? Are there use cases that require a higher level of authentication?	Caller name and phone number.
92. What type of IVR is in use (if any) with the Cisco UCCX system?	None.
93. How many service requests are created by your agents per month?	Approximately 2100 service requests per month.
94. Mobile-Will the mobile app need to connect to any services in addition to the new 311 tool and for what purpose?	No.
95. Mobile-Do you have any incident forms that require anything beyond: upload photo, location (lat, long, description), text fields, select fields, date/time fields, radio button fields?If so, please describe and provide the rough number of forms.	No.
96. Mobile-What are the language requirements? Please describe if they are for agent and/or customer as well.	. Language requirements are for customers. Multilingual capabilities are required.
97. Service Level Agreements-Please describe your current and future Service Level Agreements (e.g., 4 levels based on priority, business hours, exceptions, etc.)	There are 5 levels of priority in Cityworks, The common business hours for the City of Cleveland are 8 AM - 5 PM.
98. Data Migration-Is data migration in scope and if so, please describe types of records and estimated number of counts.	Data migration and/or integration is an option.
99. Channels-Please describe all desired intake methods. The document states phone or email but are there more outside of the mobile app?	Please refer to RFP-pg. 7 identified throughout. Phone, Email, Web form, mobile application, text message
100. Integrations-Please describe all desired integrations, their use cases and direction of integration (e.g., system A to new 311 system, 311 system to System A, bi-directional, etc.)	Please refer to RFP pg. 5. All inetgrations are bi-directional.
101. Integrations-For the social integrations, are you using a tool today such as Sprinklr to aggregate the sources?	No.
102. Groups-Are external groups involved in the 311 system that need to have access granted and if so, please elaborate on the use cases at a high level as well as any security rules that must be in place for those.	Cleveland City Council would need access to create and view requests from citizens.

103. How many instances/domains of Cityworks does the city have?	We have 9 domains of Cityworks
104. Does the city have the SR/CE API for each Cityworks domain?	Yes, we have SR API and WO API.
105. Asking residents to use a different base solution than 311 can create challenges for the city, residents, and potentially negatively impact project long term viability. If the winning vendor has an online portal, app, etc. for service requests, would the city be willing to replace citizen problem reporter with the vendor's? If not, please explain the strategy to staying with CPR.	Yes, the City did not implement CPR.
106. Would the city allow ongoing post-implementation support for the term of the agreement, if it had no impact on cost?	Yes.
107. Does the city have a preference for a supported product vs a delivered product with no post-implementation support after 60 days?	No
108. Does the city have the necessary modules for an integration with CISCO?	Not enough information to respond.
109. What is the city's expectation around "prompts for additional services"? EG: Will the city inform the vendor what "pieces" go together?	Question is unclear.
110. Please explain further the "complex referrals for multiple department issues." Can you provide an example?	As an example: A single request may need to be triaged to multiple teams. A nuisance property is reported by a resident. Referred to grass cutting crews for mowing; reported to street crews to clear debris from yard; reported to health / building inspectors for citation.
111. Does the city have an authoritative geocoding service consumable by an endpoint from a 3rd party/winning vendor?	A complaint was recieved of illegal dumping on a vacant property. The structure has open access points. The yard had high grass and weeds and an abandoned vehicle parked in the rear. We will need to engage our illegal dumping crew, grass cutting crew, Building and Housing for a board up and Police to removal of the vehicle.
112. How many different top level request types does the city expect, and how many	The 311 call center currently has 59 different service request types.

individual workflows/rules does the city expect on go live?	
113. What is the intent of the citizen segmentation?	To be able priority, repeat and chronic callers.
114. What is the intended outcome of being able to flag chronic callers?	It may be critical in establishing a rapport with a frequent caller.
115. How does the city intend to solicit feedback while ensuring all recipients "opt-in" to those solicitations?	Surveys
116. What is the document management system, and would the city be willing to leverage an API to pull these files from the vendor's system?	The city does not have one.
117. Please explain further how the city intends to capture an incoming mail/fax?Is an individual scanning these into the system? How many staff are dedicated to capturing mail and creating a case?	We're looking to the vendor to tell us the best way to capture incoming mail/faxes. We currently have 7 call takers and one call center manager.
118. Is the city intending for the winning vendor to integrate with analytic platforms like tableau or power BI - or is the city intending to leverage the vendor's API to call for that information? If it is the former, should we include pricing to that effect?	City is expanding its analytics capabilities now. We expect data will be viewed using Tableau/PowerBI enterprise wide and created by team of ~10 builders. We're looking to the vendor to provide the best way to deal with this scenario.
119. Does the city maintain an authentication service today, like ADFS?	Yes
120. Please explain how the city expects the requirement of "routing escalated case to a senior call taker"? Is this a cisco transfer function? A workflow function based on the type of issue that then creates a case in the senior call taker's to-do list?	We're looking to the vendor to provide the best way to deal with this scenario.
Does the City of Cleveland utilize the Esri ArcGIS to retrieve shapefiles as well as the ArcGIS Workforce solution?	Yes. The city has an enterprose Esri ArcGIS soltuion.

1. Decision Maker -Who is involved in the project (DMU): Influencers Decision Making Proces Signing Entity Location	N/A
2. Budget -Budget available - yes/no -Current spend or budgeted for the project (if any):	N/A
3. Next steps - Demo Date & Required Attendees	Pls refer to RFP. Demo dates will be identified if you're selected to move to second round of scoring.
4. Can we bid with a Cleveland SBE as a sub to them?	Yes, please see OEO requirements in RFP.
5. Please confirm if both digital and hard copies are required for the technical and fee proposals.	City prefers digital, however, hard copies are accepted.
6. The Proposal Checklist (Attachment D) shows the Management Letter, Solution and Professional Services Description and Staffing Plan (Includes Resumes) as "N/A". Please confirm that the aforementioned item descriptions in this question are required or are not required as part of the RFP submission.	Required as part of the RFP submission
7. For the RFP submission, should all items (except for the Technical and Fee Proposals) be sent via email in a single PDF file? Or, is a hard copy of the main RFP submission also required?	All items are required to be submitted by the deadline either emailed or hard copy.
8. What is the overall budget for this program?	N/A
9. Is there a preference for an in-state Ohio vendor? If so, please elaborate on points or other advantages that will be given to Ohio vendors.	Please see OEO requirements in RFP
10. Please provide the point allocation for scoring in Round 2, that will result in the maximum of 75% of the evaluated score. Please clarify if the remaining 25% is based on price, or what other factor(s) will be considered.	Please refer to Appendix E in RFP.
11. What is the expected budget of the project?	N/A
12. Extension- due to the overall size of the scope of this RFP, will the City of Cleveland- ITS consider an due date extension?	No extensions granted.

13. Please confirm if Appendix A - F items are to be included in the Technical Proposal response, the Fee Schedule Response, as separate documents, or all as one standalone document, or other.	Please refer to RFP submission requirements. Fee proposals are submitted in a separate sealed package.
14. The referenced RFP states on page 4 that it wishes the technical and fee proposals to be submitted separately electronically through email. On the same page it says that the proposals must be submitted in separate sealed envelopes. Can you please confirm whether the City desires electronic submissions, physical submissions, or both?	Please refer to RFP submission requirements. Fee proposals are submitted in a separate sealed package.
15 For short-listed proposers, would the city sign an NDA for release of financial statements, and hold them as confidential documents?	Yes
16. For vendors who are partnering on a response as prime/sub, what information do you need from the sub as it relates to company, profile, qualifications, representative projects, project methodologies, required city forms, etc.	Please see OEO Schedules 1-4 (Appendix A)